**Detailed M&E Planning Tip Sheet**

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| **Detailed M&E Plan** |

*M&E Matrix*

* Start by identifying WHAT exactly does the indicator want to measure.
* 4 key considerations for INDICATOR DEFINITIONS:
  1. Define unclear terms (adequate, sustainable, appropriate, etc.)
  2. Determine “Count 1 unit WHEN” (where applicable)
     1. Determine the unit.
     2. Determine the criteria needed to count 1 unit.
        1. Example: # training participants who have knowledge.
           1. Unit = training participants
           2. Count 1 training participant as having knowledge when she/he meets what criteria? Passes a test? Demonstrates the use of knowledge? Etc.
  3. Determine how to CALCULATE the indicator.
     1. Define numerator and denominator
  4. Provide details if the indicator must be DISAGGREGATED (broken down) by gender, age, geographical location etc.
* There is often more than one Means of Verification. The data can be verified starting at the most basic level and working up until it is consolidated into the Indicator Tracking Table. This will help with identifying and devising data collection tools and databases.
  + Example: In an agriculture project you may have:
    - Farmers tracking their increase in use of organic fertilizer.
    - Extension officers collecting that data into a database for his/her district.
    - Project coordinators collecting extension officer data for the whole project.
      * If “Count 1 unit WHEN” is required, then the MoV at each level must meet the “Count 1 unit WHEN” criteria in order for the data to be accurately rolled up for inclusion in the ITT.
* Frequency = number of times the indicator will be collected during the project; Schedule = the exact date when the indicator data will be collected.
* The DATA ANALYSIS column is to be used at the discretion of the project team. Do what is practical. This could be used to include indicator-specific guidance for reflection meetings, to remind the team how the indicator relates to the next-level analysis, how to interpret the importance of the indicator, how important a given indicator is in relation (or in concert) with other indicators, etc.

*Indicator Tracking Table (ITT)*

* Make sure to fill in the BASELINE DATA include the date and unit of measure.
  + Targets can be measured only if baseline data has been identified.
* The most important part of the ITT is determining TARGETS
  + It is often best to start with the Life of Project target first, then determine annual targets, and finally determine quarterly targets.
* OUTCOME, OUTPUT and ACTIVITY indicators and their targets are linked.
  + If all *activities* are completed then the *output* indicator target normally should be 100%.
  + If all OUTPUT indicator targets read 100%, then the OUTCOME indicator targets should be 100%.
  + If OUTCOME indicator targets are 100% then the project should be reaching its goal.
* Double check all CALCULATIONS in the ITT to ensure they correctly measure the indicator.
  + It is suggested to use whole numbers rather than percentages.
    - Convert percentages into whole numbers and note the percent target in the final “Status” column of the ITT.
  + Percent change indicators can be particularly challenging.
    - Remember, the formula for percent change is ((b-a)/a)\*100.
      * a = baseline (starting data point)
      * b = actual (second data point)

*Activity Tracking Table (ATT)*

* The ATT should include only MAJOR activities, not tasks.
  + Example: complete a training = Activity.
  + Example: hire a facilitator for the training = Task.
* The ATT adds DETAIL to the Project Work Plan.
  + Most importantly it adds firm TARGETS for each Activity.
* A BENEFICIARY tracking line may be added to the ATT for management purposes to track the number of beneficiaries for each activity.